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# **Health Enrollment Training Session for State Employers**

**my|CalPERS Student Guide**

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## my|CalPERS Health Enrollment Training

### Overview

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**Course  
description**

This course is designed to prepare you to:

- Log In to my|CalPERS
  - Query health participants
  - Create and maintain health enrollment records
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**Highly  
Recommended**

Prior to this Instructor-Led Training (ILT), it was recommended that you reviewed the following my|CalPERS Computer-Based Training (CBT) courses.

**CBT-01 my|CalPERS Overview and Demographics for Employers**

Which covers how to:

- Navigate through my|CalPERS
- Log in, maintain demographic information, and upload and view documents
- Get employer certification, receive online help, and access reports

**CBT-02 Profile Maintenance for Employers**

Which covers how to:

- Keep your employer profile up to date
  - Maintain your agency's business partner contact information and business partner relationships
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## Logging In to my|CalPERS



You must log in to my|CalPERS before you begin any transaction.

**Step-by-Step** Follow the steps in the table below to log in.

Step	Action	Result
1	Open a new Internet browser window and enter the following URL:  <b>[external training environment URL]</b>	<i>my CalPERS website displays.</i>
2	Select the <b>Log in</b> button.	<i>Pre-Login page displays.</i>
3	Select the <b>Business Partner</b> radio button, and then select the <b>Continue</b> button.	<i>Log in to my CalPERS page displays.</i>
4	Enter the following:  • <b>Username</b> • <b>Password</b>	
5	Select the <b>Log In</b> button.	<i>Conditions of Use of Employee Data for Employers page displays.</i>
6	Select the <b>Accept</b> button.  <i>Note:</i> You are logged in to my CalPERS.	<i>My Home page displays.</i>
	You have completed this scenario.	

## Unit 1: Query Features

### Introduction

The my|CalPERS query feature allows you to search for a participant's information by CalPERS ID or Social Security number (SSN).

Query information displays below the search criteria in the Search Results section.




Your employee has a question about their health benefits.

You will verify your employee's health enrollment information with your agency by querying my|CalPERS.

### Step-by-Step

Follow the steps in the table below to perform a Query.

Step	Action	Result
1	From the <i>my CalPERS – My Home</i> page, select either the <b>Person Search</b> link from the left-side navigation menu or the <b>Person Information</b> tab from the global navigation tab menu.	<i>Search for a Person</i> page displays.
2	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by Social Security number.	<i>my CalPERS – My Profile</i> page displays.
3	Select the <b>Health Enrollment</b> local navigation link.	<i>Select Health Account</i> page displays.
4	In the Select Health Account section, select the <b>CalPERS Employment</b> link for the participant's <i>detailed</i> health enrollment information.  <i>Note:</i> If you choose the <b>Health Account Summary</b> link below the Select Health Account section, you will see <i>high-level</i> health enrollment information for the participant information (i.e., current plan name and party rate) for the participant.	<i>Summary of Health Accounts</i> page displays.
	You have completed this scenario.	

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## Unit 2: Add & Update Health Transactions

### Overview

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**Introduction** The health enrollment process enables you to enroll your participants in health and make changes using my|CalPERS.

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## Scenario 1: New Health Enrollment to an Existing Appointment



Your new participant has an updated appointment with your agency reflected in my|CalPERS. The participant is eligible and has requested to enroll in health benefits with their daughter.

You will process a New Health Enrollment for the participant and one dependent in my|CalPERS.

**Step-by-Step** Follow the steps in the table below to process a New Health Enrollment.

Step	Action	Result
<i>New Enrollment and Reason</i>		
1	From the <i>my CalPERS – My Home</i> page select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	In the Enrollment List section, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, select the <b>Select</b> link.	<i>Search for a Person</i> page displays.
5	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event Information section: <ul style="list-style-type: none"> <li>• <b>Health Event Type:</b> "New Enrollment"</li> <li>• <b>Health Event Reason:</b></li> <li>• <b>Event Date</b></li> <li>• <b>Received Date</b></li> <li>• <b>Medical</b> checkbox for <b>Apply Change to</b></li> </ul>	

*Continued on next page*



## Scenario 1: New Health Enrollment to an Existing Appointment, continued


### Step-by-Step (continued)

Step	Action	Result
8	<p><b>Note:</b> Because the participant already has an existing retirement appointment, all sections on the page will be prepopulated. However, if necessary, ensure the following:</p> <ul style="list-style-type: none"> <li>• Use <b>address for Health</b> checkbox is marked if not using another address i.e., work or residential (if P.O. box was mailing) for health plan area eligibility</li> <li>• Maintain Communication Details section fields are populated, if needed</li> </ul> <p>Select the bottom-left <b>Save &amp; Continue</b> button.</p>	<p><i>Health Enrollment Information</i> page displays.</p> <p>The participant is listed in the Covered Person List section.</p>
9	<p>Is the participant enrolling self only?</p> <ul style="list-style-type: none"> <li>• If <i>yes</i>, assign the participant's chosen medical plan by selecting the <b>Save &amp; Continue</b> button. The <i>Select Covered Person</i> page displays. Skip to Step 15.</li> <li>• If <i>no</i> (the participant has dependents), <u>don't select</u> the <b>Save &amp; Continue</b> button. Continue to step 10.</li> </ul>	
<b>Add Dependent and Select Medical Plan</b>		
10	Select the <b>Add New</b> button.	<i>Existing Relationships Eligible for Health</i> page displays.
11	Select the <b>Add New</b> button.	<i>Demographic Information</i> page displays.
12	<p>Populate the following fields in the Person Details section:</p> <ul style="list-style-type: none"> <li>• <b>First Name</b></li> <li>• <b>Last Name</b></li> <li>• <b>SSN</b></li> <li>• <b>Gender</b></li> <li>• <b>Relationship:</b></li> <li>• <b>Dependent Type:</b></li> <li>• <b>Date of Birth</b></li> </ul>	
13	Select the <b>Save &amp; Continue</b> button.	<i>Dependent Information</i> page displays.

*Continued on next page*

## Scenario 1: New Health Enrollment to an Existing Appointment, continued

### Step-by-Step (continued)

Step	Action	Result
14	Select the <b>Save &amp; Continue</b> button.	<i>Select Covered Person</i> page displays. Newly added dependent displays in Covered Person List section.
15	Select the <b>Save &amp; Continue</b> button.	<i>Medical Plan Selections</i> page displays.
16	Select the radio button for the appropriate Medical Plan, and then select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Staging</i> page displays.
	You have completed this scenario.	

## Scenario 2: Open Enrollment – Change Health Plan



It is Open Enrollment and your participant elects to change health plans.

You will process the plan change in my|CalPERS.

### Step-by-Step

Follow the steps in the table below to process an Open Enrollment-Change Health Plan.


Step	Action	Result
1	From the <i>my CalPERS – My Home</i> page, select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	Next to Enrollment List, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, select the <b>Select</b> link.	<i>Search for a Person</i> page displays.
5	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Information section:  <ul style="list-style-type: none"> <li>• <b>Health Event Type: "Open Enrollment"</b></li> <li>• <b>Health Event Reason: "Open Enrollment Change Health Plan"</b></li> <li>• <b>Event Date</b></li> <li>• <b>Received Date</b></li> <li>• <b>Medical</b> checkbox for <b>Apply Change to</b></li> </ul>	
8	Select the <b>Save &amp; Continue</b> button.	<i>Medical Plan Selection</i> page displays.

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## Scenario 2: Open Enrollment – Change Health Plan, continued

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### Step-by-Step (continued)

Step	Action	Result
9	Select the radio button for the participant's chosen medical plan.	
10	Select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment</i> page displays.
	You have completed this scenario.	

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## Scenario 3: Rescind Open Enrollment Plan Change



It is December 15th, and a participant informs you that they want to return to their original health plan. You will rescind the participant's Open Enrollment-Change Health Plan transaction.

**Important!** You can only rescind health enrollment transactions for permissive (not mandatory) qualifying health events that have future effective dates.

You will rescind their plan change request using my|CalPERS.


**Step-by-Step** Follow the steps in the table below to process a Rescission.

Step	Action	Result
1	From the <i>my CalPERS – My Home</i> page, select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	In the Enrollment List section, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, select the <b>Select</b> link.	<i>Search for a Person</i> page displays.
5	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays with Demographics Information section populated with participant's information.
7	In the Demographics Information section, select the <b>Rescind an Existing Transaction</b> link.	<i>Health Enrollment History</i> page displays.

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## Scenario 3: Rescind Open Enrollment Plan Change, continued

### Step-by-Step (continued)

Step	Action	Result
8	In the Health Enrollment History section, find the Open Enrollment Change Health Plan transaction that needs to be rescinded, and select the radio button next to its effective date.  <i>Note:</i> The transaction MUST have a status of “ <b>Future</b> ” in order to rescind it.	
9	Select the <b>Rescind</b> button.	<i>Transactions Details</i> page displays.
10	In the Rescission Confirmation section, select the appropriate option from the <b>Reason for Rescission</b> dropdown, and then select the <b>Save &amp; Continue</b> button.  <i>Note:</i> <b>Additional Information</b> field is optional.	<i>Health Event Information</i> page displays. The Health Event Information section is populated with the participant’s rescinded transaction information.
11	In the Health Event Information section, the <b>Request for Rescission</b> field will say “ <b>true</b> ” and the <b>Reason for Rescission</b> field will be populated accordingly.  Select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Summary</i> page displays.
	You have completed this scenario.	

## Scenario 4: Open Enrollment – Add Dependent



During Open Enrollment, your participant has a completed and approved Affidavit of Parent-Child Relationship form and is adding a child to their health enrollment.

You will add the dependent during Open Enrollment using my|CalPERS.

### Step-by-Step

Follow the steps in the table below to process an Open Enrollment-Add Dependent transaction.

Step	Action	Result
<i>Select Subscriber</i>		
1	From the <i>my CalPERS – My Home</i> page, select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	In the Enrollment List section, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, choose the <b>Select</b> link.	<i>Search for a Person</i> page displays.
5	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event section:  <ul style="list-style-type: none"> <li>• <b>Health Event Type: "Open Enrollment"</b></li> <li>• <b>Health Event Reason: "Open Enrollment Add Dep"</b></li> </ul> <b>Important!</b> When adding a dependent outside of Open Enrollment dates, select <b>"Add Dependent"</b> as <b>Health Event Type</b> and the appropriate <b>Health Event Reason</b> .	


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## Scenario 4: Open Enrollment – Add Dependent, continued

### Step-by-Step (continued)

Step	Action	Result
8	Continue to populate the following fields in the Health Event section: <ul style="list-style-type: none"> <li>• <b>Event Date</b></li> <li>• <b>Received Date</b></li> <li>• <b>Medical</b> checkbox for <b>Apply Change to</b></li> </ul>	
9	Select the <b>Save &amp; Continue</b> button.	<i>Existing Relationships Eligible for Health</i> page displays.
<b>Add Dependent</b>		
10	In the Existing Relationships Eligible for Health section, select the <b>Add New</b> button.	<i>Demographic Information</i> page displays.
11	Populate the following fields in the Person Details section: <ul style="list-style-type: none"> <li>• <b>First Name</b></li> <li>• <b>Last Name</b></li> <li>• <b>SSN</b></li> <li>• <b>Gender</b></li> <li>• <b>Relationship</b></li> <li>• <b>Dependent Type</b></li> <li>• <b>Date of Birth</b></li> </ul> <p><i>Note:</i> The Address Details section will be populated with the primary subscriber's address.</p>	
12	Select the <b>Save &amp; Continue</b> button.	<i>Dependent Information</i> page displays.
13	In the Dependent Information section, enter the appropriate date in the mandatory <b>Acquired Date</b> field, and then select the <b>Save &amp; Continue</b> button.	<i>Select Covered Persons</i> page displays.
14	Select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
	You have completed this scenario.	



## Scenario 5: Delete Dependent



Your participant brought in a copy of their divorce decree and must delete their ex-spouse from their health enrollment.

You will process a Delete Dependent transaction, removing the ex-spouse from the participant's health enrollment, using my|CalPERS.


**Step-by-Step** Follow the steps in the table below to process a Delete Dependent transaction.

Step	Action	Result
<i>Select Subscriber</i>		
1	From the <i>my CalPERS – My Home</i> page, select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	In the Enrollment List section, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, select the <b>Select</b> link.	<i>Search for a Person</i> page displays.
5	Enter the participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select the <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays with Demographics Information section populated with participant's information.
7	Populate the following fields in the Health Event section:  <ul style="list-style-type: none"> <li>• <b>Health Event Type: "Delete Dependent"</b></li> <li>• <b>Health Event Reason: "Divorce"</b></li> <li>• <b>Event Date</b></li> <li>• <b>Received Date</b></li> <li>• <b>Medical</b> checkbox for <b>Apply Change to</b></li> </ul>	
8	Select the <b>Save &amp; Continue</b> button.	<i>Select Covered Persons</i> page displays.

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## Scenario 5: Delete Dependent, continued

### Step-by-Step (continued)

Step	Action	Result
<i>Select Dependent</i>		
9	Select the dependent name link of the one being deleted.	<i>Demographic Information</i> page displays.
10	Select the bottom-left <b>Continue</b> button.  <i>Note:</i> Deleted dependent will not be listed in Covered Person List section, but will be listed in the Dependent Change section with a Medical status of “No.”	<i>Dependent Information</i> page displays.
11	Select the <b>Save &amp; Continue</b> button.	Covered Person List and Dependent Change sections display.
12	Deleted dependent will not be listed in Covered Person List section, but will be listed in the <b>Dependent Change</b> section with a Medical status of “No.”  Select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
	You have completed this scenario.	

## Scenario 6: New COBRA Health Enrollment



The ex-spouse from the previous scenario is electing COBRA since they were deleted from the employee's health enrollment due to divorce.

You will enroll the ex-spouse in COBRA with their chosen plan with the same effective date as the deletion effective date using my|CalPERS.


**Step-by-Step** Follow the steps in the table below to process a New COBRA Enrollment.

Step	Action	Result
1	From the <i>my CalPERS – My Home</i> page, select the <b>Reporting</b> global navigation tab.	<i>Manage Reports</i> page displays.
2	In the Create or Edit Report section, select <b>Add or Edit Health Enrollment</b> from the <b>Method</b> drop-down list, and then select the <b>Continue</b> button.	<i>Health Enrollment Preprocessing</i> page displays.
3	In the Enrollment List section, select the <b>Add New</b> button.	<i>Health Event Information</i> page displays.
4	In the Demographics Information section, select the <b>Select</b> link.	<i>Search for a Person</i> page displays
5	Enter the COBRA participant's CalPERS ID in the <b>CalPERS ID</b> field, and then select <b>Search</b> button.  <i>Note:</i> You may also search for a participant by their Social Security number.	Below the Person Search section, the Search Results section is populated with participant's information.
6	Select the radio button next to the participant's CalPERS ID, and then select the <b>Select</b> button.	<i>Health Event Information</i> page displays.
7	In the Demographics Information section, enter demographic information for the enrolling COBRA participant.	
8	Populate the following fields in the Health Event section: <ul style="list-style-type: none"> <li>• <b>Health Event Type:</b> "COBRA New Enrollment"</li> <li>• <b>Health Event Reason:</b> "COBRA/Div/Sep/ Mv from Household"</li> <li>• <b>Event Date</b></li> <li>• <b>Received Date</b></li> <li>• <b>Medical</b> checkbox for <b>Apply Change to</b></li> </ul>	
9	Select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Information</i> page displays.

*Continued on next page*

## Scenario 6: New COBRA Health Enrollment, continued

### Step-by-Step (continued)

Step	Action	Result
<b><i>Review/Update Information and Select Health Plan</i></b>		
10	<p>Populate the following fields in the Maintain Address Details section:</p> <ul style="list-style-type: none"> <li>• COBRA participant's address and communication details</li> <li>• <b>Use address for Health</b> checkbox if not using another address i.e., work or residential (if P.O. box was mailing) for health plan area eligibility</li> </ul>	
11	<p>In the Appointment Details section, if necessary, enter the <b>Original Hire Date</b> of the PRIMARY SUBSCRIBER.</p> <p><b>Note:</b> In the COBRA Enrollment section below the <b>Medical Group</b> field, the fields are populated based upon Event/Received dates entered on previous page.</p>	
12	Select the <b>Save &amp; Continue</b> button.	<i>Confirm Address</i> page displays.
13	Select radio button for correct <b>Entered Address</b> or <b>U.S. Postal Service Matches</b> and select the <b>Confirm</b> button.	<i>Health Enrollment Information</i> page displays.
14	Select the <b>Save &amp; Continue</b> button.	<i>Medical Plan Selection</i> page displays.
15	Select the radio button for the enrollee's chosen health plan, and then select the <b>Save &amp; Continue</b> button.	<i>Health Enrollment Staging</i> page displays.
	You have completed this scenario.	

## Appendix: Terms and Definitions

### Overview

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**Introduction** This appendix contains commonly used terms in my|CalPERS which pertain to the topics in this ILT Guide.

*Note:* Terms and definitions are listed alphabetically.

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**Contents** This unit contains the following terms and definitions:

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## Appendix: Health Enrollment Terms and Definitions

<b>Appointment</b>	A continuous block of employment with a single employer from the point of hire until permanent separation. Appointment information is required for a health enrollment.
<b>Appointment event date</b>	The date the appointment event occurs.
<b>Appointment ID</b>	The unique 10-digit identification number assigned by CalPERS to the subscriber's qualifying position. Benefits are associated to the appointment ID. If a participant has multiple appointments, they will have multiple appointment identification numbers.
<b>Health</b>	A general term used for all three benefits: medical, dental, and vision.
<b>Health account</b>	The type of role that the subscriber has in order to request changes to their health enrollment. For active employees, this status will reflect as "active employment." Once the subscriber retires, their status is updated to "retired."
<b>Health account status</b>	<p>The health eligibility basis that qualifies the subscriber for health enrollment. The health account statuses are:</p> <ul style="list-style-type: none"><li>• <b>Active:</b> The subscriber is enrolled for health coverage. The employer is contributing toward their health premiums.</li><li>• <b>Canceled:</b> The subscriber is no longer enrolled for health coverage. No one is currently paying for their health coverage.</li><li>• <b>Direct Pay:</b> The subscriber is enrolled in health coverage for which they are paying their health carrier directly.</li></ul>

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## Appendix: Health Enrollment Terms and Definitions, continued

<b>Health account status</b> (continued)	<ul style="list-style-type: none"><li>• <b>COBRA:</b> The subscriber, following a specific qualifying event, has elected to continue their health coverage through COBRA, a Federal program, and pay the health carrier directly.</li></ul>
<b>Health enrollment transaction</b>	The record of a change to the subscriber's health enrollment. You create a health enrollment transaction when you submit a combination of a health event type and health event reason, along with relevant required information. <i><b>Example:</b></i> The health enrollment transaction is "add dependent" if the action on a subscriber's health enrollment is to add a new health dependent.
<b>Health event reason</b>	The qualifying event that permits the action you will take on a subscriber's health enrollment. <i><b>Example:</b></i> Birth/placement
<b>Health event type</b>	The action that you take on a subscriber's health enrollment due to a qualifying event. The action you can take is limited by the reasons for the action. <i><b>Example:</b></i> Add dependent (due to birth or placement of a child into a household for adoption)
<b>Mandatory qualifying event</b>	An incident that requires a change in a subscriber's health enrollment. <i><b>Example:</b></i> Divorce, birth of a child, or layoff
<b>Permissive qualifying event</b>	An incident that gives the subscriber the option to enroll or make a change in their health enrollment. <i><b>Example:</b></i> Marriage, custody change, or move
<b>Person ID</b>	The unique identifier of the person who qualifies for health enrollment which could be the SSN or a CalPERS system-generated 10-digit ID number.